# MONTANA WILD SCHEDULER APPLICATION USER MANUAL

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### I. CALENDAR VIEWS

This allows a user to select a specific Calendar View.

From the Internet Browser (Internet Explorer, FireFox or Chrome, etc.) go to www. and you will see the Montana Wild Scheduling application. Select the "Calendar Views" button.



There are two Calendar Views available that can be selected:



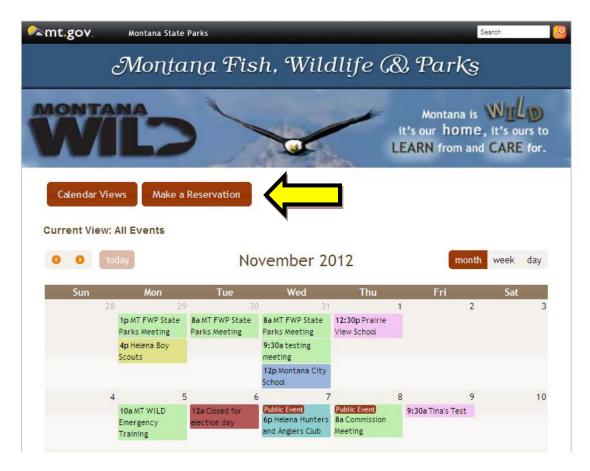
- ➤ All Events this shows all Events scheduled at the Center
- > Events Open to the Public this shows only the Events that are Open to the Public.

# II. MAKE A RESERVATION

This allows a user to make a Reservation.

NOTE: Some event types require more information such as School Events.

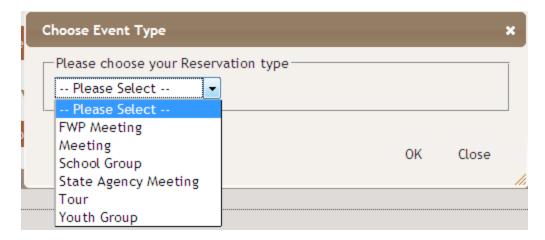
From the main screen select the "Make a Reservation" button.



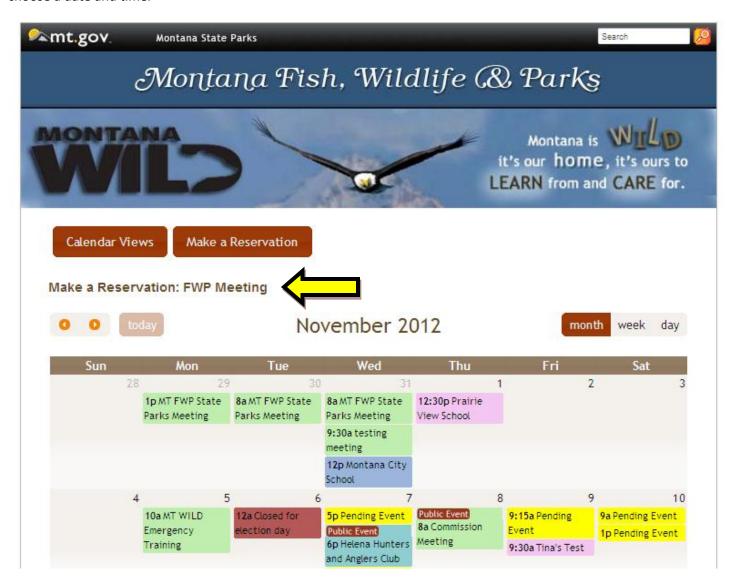
You will get prompted to "Choose Event Type", use the down arrow to see the list of available types of events that can be scheduled.



From the drop down list, choose the Event Type.



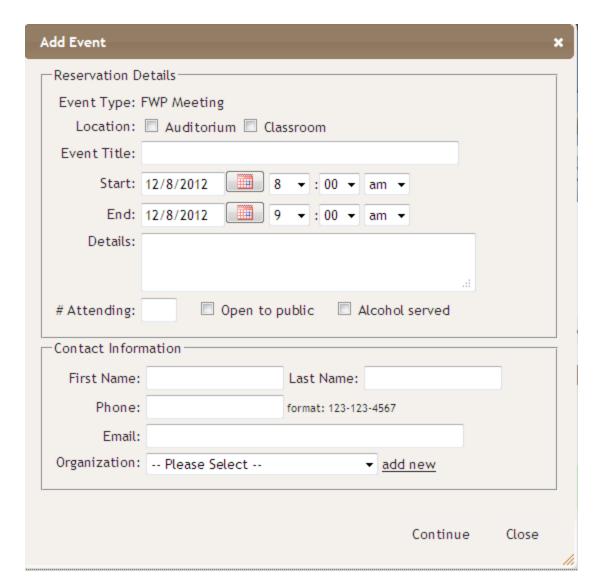
Once you choose the Event Type and hit OK, you will get the Calendar displayed for that specific event to allow you to choose a date and time.



Notice we chose "FWPMeeting"

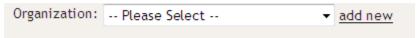
Select the Day by clicking on the calendar day desired.





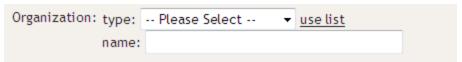
It will open the Add Event dialog box and you can proceed to fill in the necessary information for the Event type that was chosen.

- > Choose the Location(s) needed for the Event
- > Type the Event Title (this will display on the Calendar)
- > Select the Start Date and Time
- Select the End Date and Time.
- Type in the Details
- > Type in the # Attending
- Indicate whether the Event is Open to the Public by selecting the box
- Indicate whether there will be Alcohol served (extra approval or forms may be necessary)
- > Type in the Contact Information including a Phone Number and the E-mail address
- > Indicate the Organization having the Event by selecting it from the drop down list

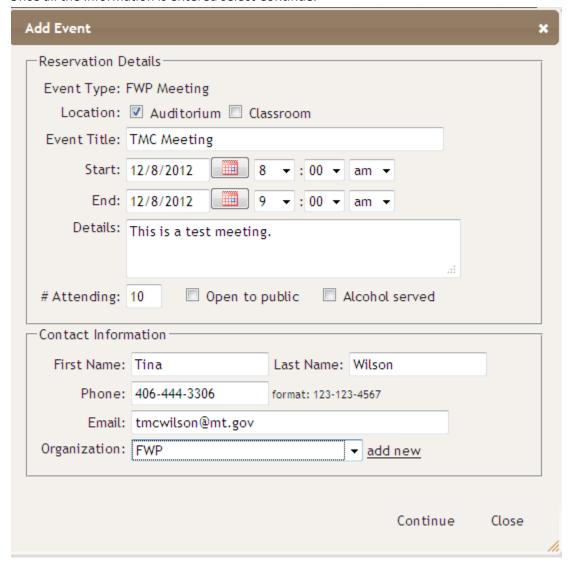


OR

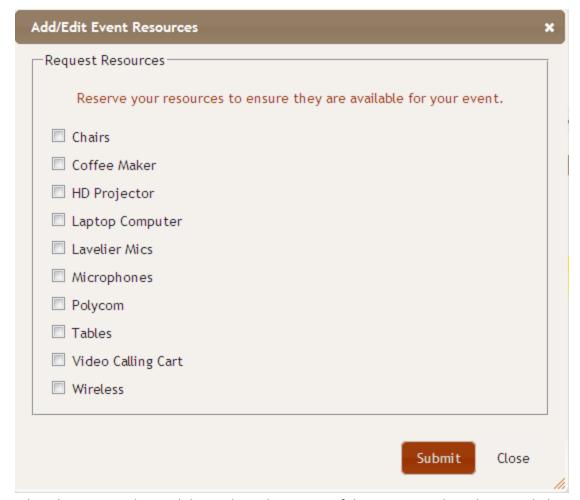
Adding a New Organization by using the Add New which allows you to indicate the Organization Type and then type in a new name



Once all the information is entered select Continue.



You will then need to indicate any Resources that you will need for the Event



Select the Resource box and then indicate how many of the Resource selected are needed.



After all the Resources are selected, hit the Submit button.



You will see at the top of the screen a message indicating that the Reservation has been submitted and is in a 'Pending' status. You should also receive an e-mail that will contain a link back to the Reservation should you need to Review, Edit or Cancel the Reservation.

Note: Anytime a change happens to the Reservation by you or by the MT Wild Staff you will receive an e-mail indicating the change.



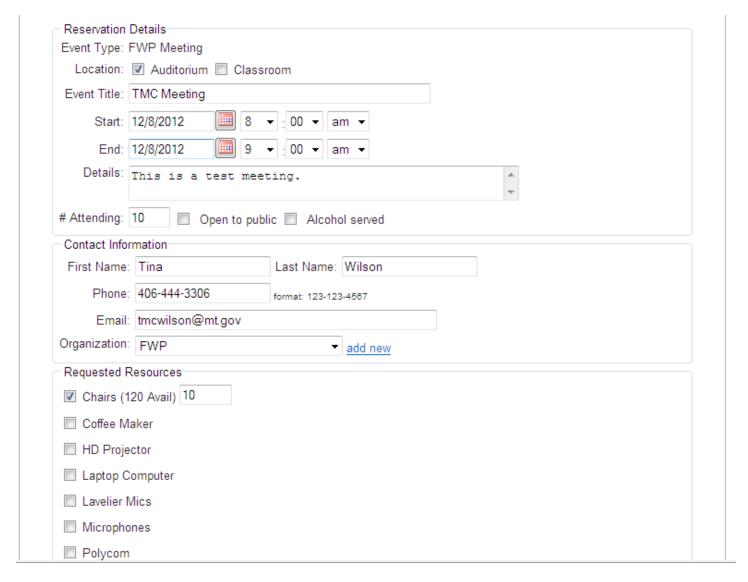
### III. EDIT A RESERVATION

This allows a user to Edit a Reservation.

From the E-mail that was received for the Reservation, click the link at the bottom of the e-mail.



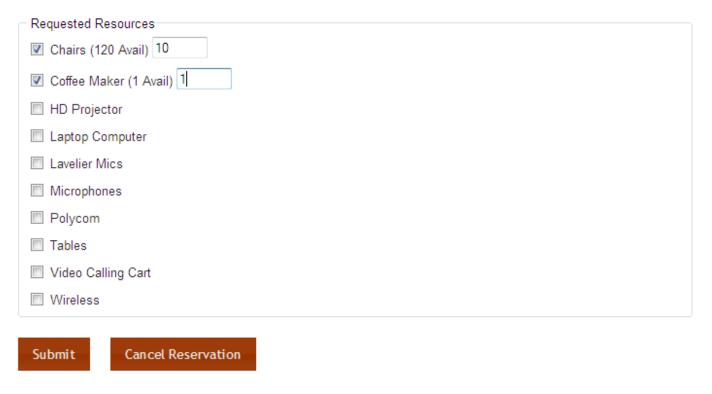
This will bring you directly into the Reservation Details.



You can edit the details or make changes as necessary.

If the Reservation has already been approved, it will the Reservation back into a Pending status.

Make the changes and then hit the Submit button.



Once you submit, there will be a message that comes at the top of the screen that indicates that the Reservation is in a Pending status and you will receive an e-mail indicating that you made changes.

Your reservation has been updated and is in a 'Pending' status until further notice. You will receive an email verification for your reservation. You will also receive email notification when the reservation status has been reviewed and changed.

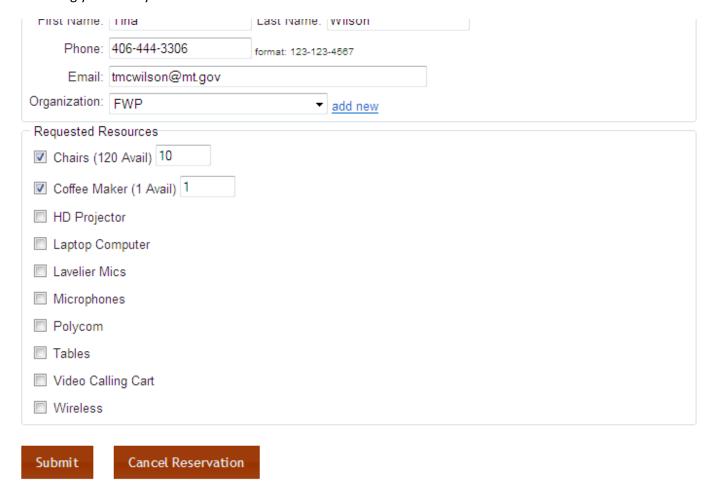
# IV. CANCEL A RESERVATION

This allows a user to Cancel a Reservation.

From the E-mail that was received for the Reservation, click the link at the bottom of the e-mail.

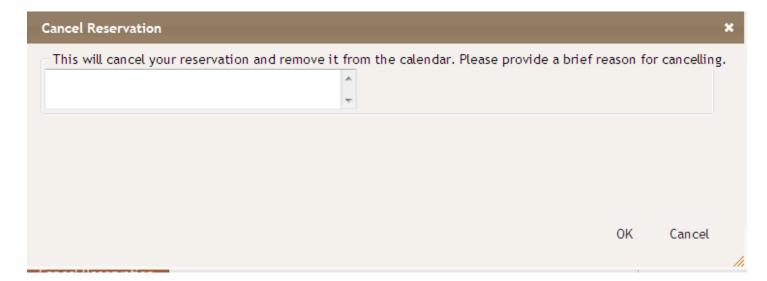


This will bring you directly into the Reservation Details.



Select the Cancel Reservation button.

You will get prompted with a box to indicate the reason for the canceling of the Event.



Type in the reason and hit OK.

A message again shows at the top of the screen indicating that the Reservation has been Cancelled.

Your reservation has been cancelled and removed from the calendar. To make another reservation dick on the 'Go to Scheduler' button

You will also receive an e-mail.



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# V. MAINTENANCE

The following are the explanations of the Maintenance Screens:



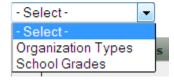
These screens allow the administrator of the application to control the various parameters that are used within the application.

**A.** <u>System Values</u> – gives the system the values that are used to populate drop down lists/check boxes in the system and determines their order.

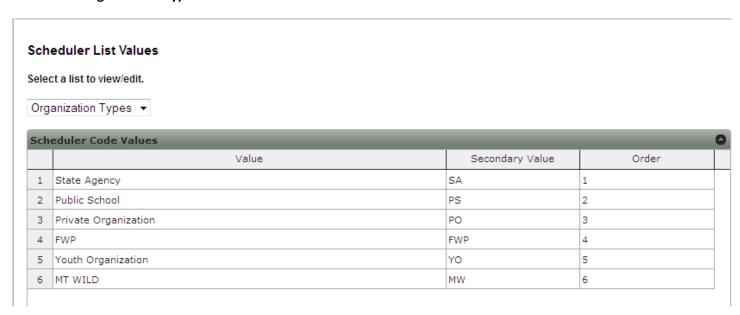
There are presently two System Values: Organization Types and School Grades

### Scheduler List Values

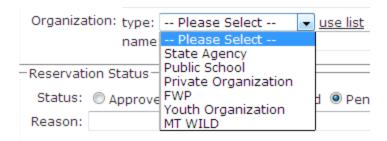
Select a list to view/edit.



# a. Organization Types



Value – is what the system shows in the drop down list.



Secondary Value – is what the system uses for reports and other processes.

Order – the order that the system displays the list in the drop down.

### b. School Grades

### Scheduler List Values

Select a list to view/edit.

School Grades ▼



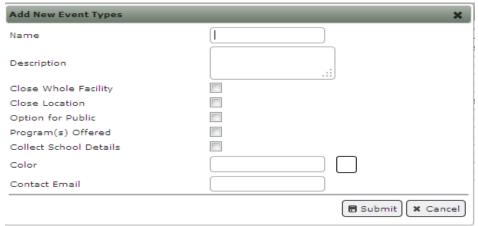
Value - is what the system shows in the selection list.

Grades: 🔲 Pre K 🔲	1st	2nd	3rd	4th	5th	6th	7th	
8th 🔲 9th								

Secondary Value – used by the system for grouping of the values

Order - the order that the system displays the list. (Note: this Order Value is also used for grouping of reporting numbers for attendance of school groups, the highest value within the secondary value is used.

**B.** Event Types – These are used by the system as events or appointment types.



Name - Name of the Event

Description – Description of the Event (This is what shows on the legend at the bottom of the calendar view)

Close Whole Facility – allows the closure of the entire facility

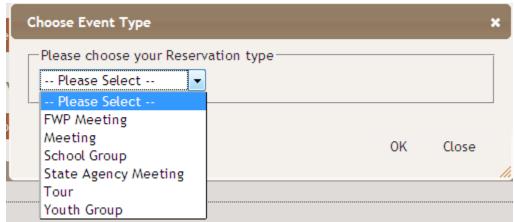
- > True: Will prevent a user from adding an event during the time/date shown.
- False: Looks to Close Location parameter for the configuration.

Close Location – allows the selection of one or more locations

- True: Will provide a list of locations that are able to be reserved for a specific room during the time/date shown and no other events can happen at the location during the time/date.
- False: Will provide a list of locations that are not able to be reserved and will allow other events to happen at the location for the date/time.

Public Viewable – indicates whether the public side will see the event.

True: Will allow the public to see this event in their list of choices



False: Will the public from seeing this event in their list of choices

Program(s) Offered – Controls the program page to allow selection

True: Will allow a user to see a list of programs for that Event



False: Will prevent a user from seeing a list of programs for that Event

Collect School Details - Controls the school details page to allow input and whether it shows for an Event

> True: Will allow the user to see the school detail page for this event.

f yes, provide grant conf	tact if different than the primary contact.
First Name:	Last Name:
Phone:	Name.
Email:	
Students with special ne	eds? 🗹 Yes
Explain:	
	.ii
Students with cultural ne	eds? ₩ Yes
Explain:	
	.ii
Grades: Pre K	1st 🔲 2nd 🔲 3rd 🔲 4th 🔲 5th 🔲 6th 🔲 7th 🗓

> False: Will prevent the user from seeing the school detail page for this event and shows the Open to Public and Alcohol served options.

Event Color – controls the color of the Event on the calendar.

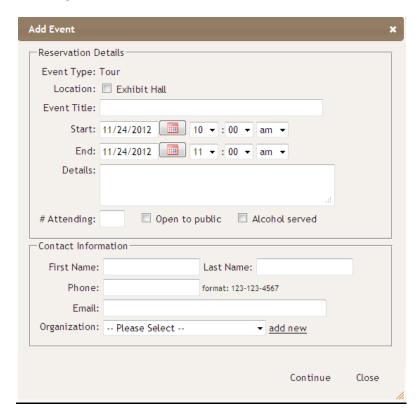
lacksquare Open to public lacksquare Alcohol served

# **Event Type Examples:**

1. Event type that does not close any other rooms or the facility as a whole.



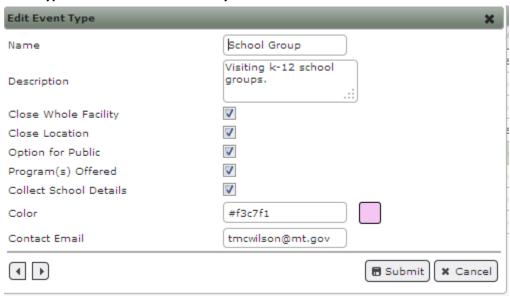
Tour is set with only the Option for Public as True (selected). So a user selecting the Tour in the Calendar would see the following:



The selection of the Location Exhibit Hall would not exclude any of the other rooms at the center from being selected during the same time.

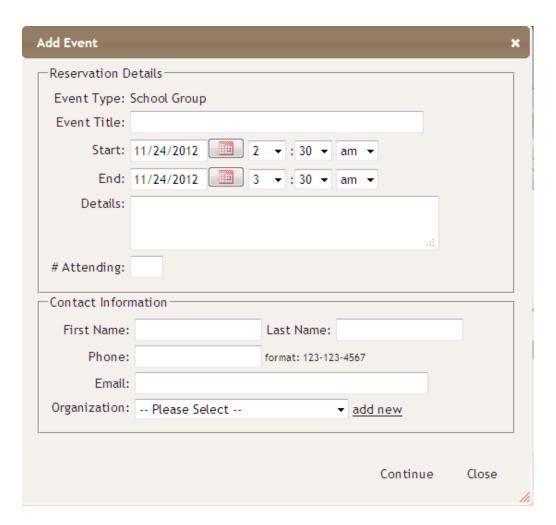
# **Event Type Examples:**

2. Event type that does close the facility as a whole.



School Group is set with Close Whole Facility and Close Location as True (selected). So a user selecting the School Group in the Calendar would see the following which does not allow a selection of rooms because it closes the entire facility (except the Exhibit Hall) from other reservations during that time:

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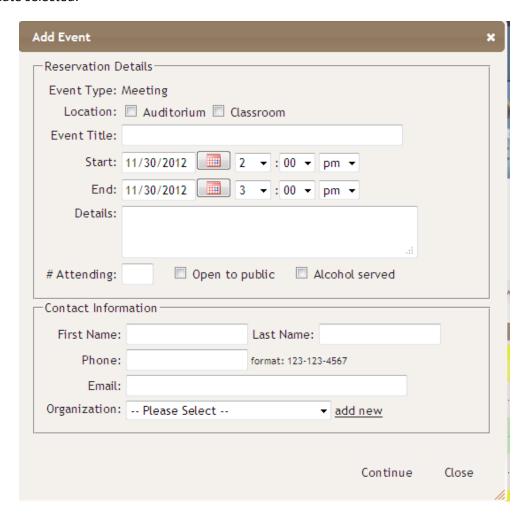


### **Event Type Examples:**

3. Event type that does not close the facility as a whole, but does close the room chosen for the time and date selected.

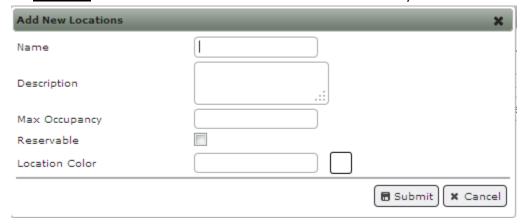


Meeting is set with Close Location as True (selected). So a user selecting a Meeting event in the Calendar would see the following which allows for a selection of rooms needed and prevents reservations for that same room(s) during the time and date selected:



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C. <u>Locations</u> – these are rooms or locations at the center that may be reserved or scheduled.



Name - Name of the Location(s) /Room

Description – Description of the Location(s) /Room

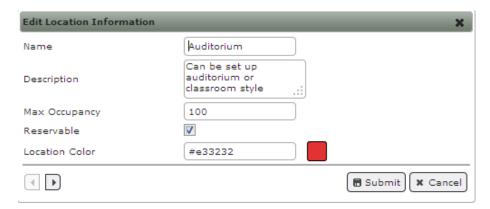
Max Occupancy – How many does the Location(s) /Room hold

Reservable – Whether the location(s) /Room is able to be reserved

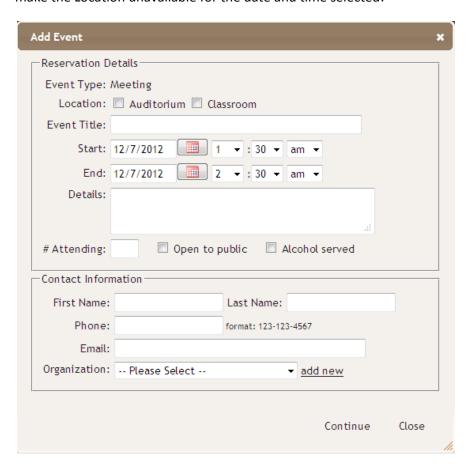
- > True: Will allow a user to see this location for an event type that does close a location for the date and time selected.
- False: Will allow a user to see this location for an event type that does not close a location.

Location Color - Color the Room on the calendar

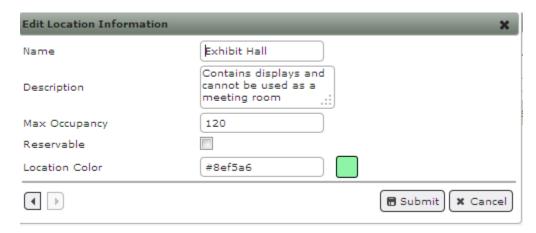
# **Explanation of Reservable True:**



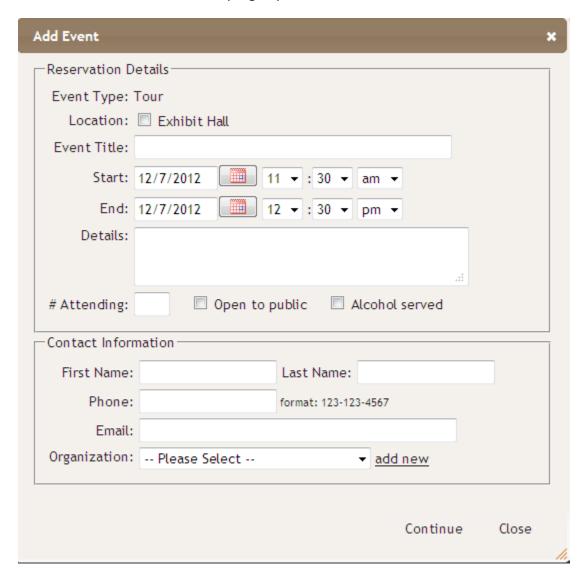
Reservable True will show in an event type as follows and allow the user to select the location for their event and it will make the Location unavailable for the date and time selected:



### **Explanation of Reservable False:**



Reservable False will show in an event type as follows and allow the user to select the location for their event but it does not close the Location for other reservations. Generally this type of Location is for Locations such as the Exhibit Hall or other Locations that can have multiple groups at the same time.

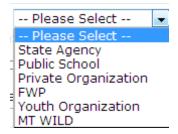


**D.** Organizations – these are organizations that will show up as available for selecting for an Event.



Name - Name of the Organization

Organization Type – this is drop down list that is maintained under the System Values. It will allow reports to use the grouping of the Organizations for reporting purpose.



Phone – phone number for the Organization (i.e., format ###-###-####)

Email – e-mail address of the contact person for the Organization

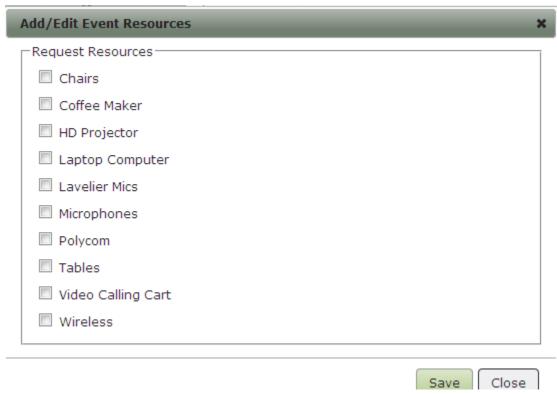
E. Resources – these are resources that can be selected during the requesting of an Event at a Location.



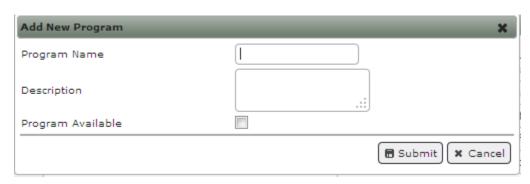
Resource Name – what you want the system to display as the Resource Name in the selection list.

Description – a brief description if an explanation is needed for further identification.

Max Available – how many total are available, this is used as the total. When a person reserves a number it is subtracted from this number for the date and time selected at the Location and Event.



**F.** <u>Programs</u> – these are the educational programs offered at the center.



Program Name - Name of Program (shows on calendar)

Description - Description of Program

Program Available – whether the program is available to be chosen by an Event that has Programs Offered True.

> True: Will allow a user to see this program on a list of programs available.



> False: Will prevent a user from seeing the program in the list of programs available.